

February 2001

**RE: EDEExpress for Windows 2001-2002, Version 7.1**

Dear EDEExpress Users:

We are pleased to announce the availability of EDEExpress for Windows 2001-2002, Version 7.1. This software version expands EDEExpress to include the Direct Loan module for the 2001-2002 award cycle as well as incorporating some minor improvements to Version 7.0.

This letter describes general changes to EDEExpress for Windows and enhancements to the Direct Loan component of the software bringing ease and flexibility to your management of Direct Loans for 2001-2002.

Included in this letter are the following:

- A list of Direct Loan enhancements,
- A list of issues from Version 7.0 that have been improved,
- The results gathered from EDEExpress benchmark testing, and
- A reminder to back up and optimize your EDEExpress database.

**How to Get the Software and Documentation**

We are distributing EDEExpress for Windows 2001-2002, Version 7.1 via the Internet. You can download the software and the related user documentation from the SFAdownload Web site, **<http://SFAdownload.ed.gov>**.

You can obtain the instructions for downloading EDEExpress for Windows in the "Downloading Software/Paper Documentation" chapter of the *EDEExpress for Windows 2001-2002 Installation Guide*.

If you do not have access to the Internet or if you have trouble opening the SFAdownload Web site to download the EDEExpress for Windows, Version 7.1 software, call Title IV WAN Customer Service at **800/615-1189** to request diskettes.

**Note:** Some organizations restrict their users from downloading from FTP sites. If you have trouble downloading, try again later. If you are still unable to download, contact your technical support staff to ensure you have full FTP download rights.

### **If You Have Technical Support and Policy Questions**

If you have SFA technical support questions and subscribe to SFATECH, you can post an e-mail on the SFATECH listserv:

**<http://www.ed.gov/offices/OSFAP/SFATECH/listserv.html>**

Make sure you include your telephone number in your message. Department staff or contractors for the system about which you have a question will see your posting and begin preparing a response.

If you have questions regarding EDExpress for Windows such as installation issues, software problem resolution, software functionality, and technical assistance, you can call CPS Customer Service. You can reach them Monday through Friday, 7 a.m. – 7 p.m. (CT), at **800/330-5947**. You can also e-mail inquiries, comments, or suggestions 24 hours a day to **CPS@NCS.COM**. A representative will respond within 24 hours.

*CPS Customer Service*

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# EDExpress for Windows, Version 7.1

EDExpress consists of four software modules:

- Application Processing
- Packaging
- Direct Loan
- Pell

Version 7.1 installs the Direct Loan module and updates Version 7.0. The Pell module will be released in a future version of the software.

## Direct Loan Enhancements

We made the following product enhancements in EDExpress for Windows 2001-2002, Version 7.1. This version activates Direct Loan program functionality.

### ***General Changes***

- Year indicators and date ranges for the 2001-2002 award year are updated.
- Data fields are modified to reflect the changes in the new 2001-2002 FAFSA.
- Beginning in 2001-2002, you can import all Demographic Data or User-Defined Queries from your previous year EDExpress database. You are prompted with these options each time you enter the software until you execute one of the options or until you indicate to the software to no longer display the options. Queries that reference modified/deleted fields, User Database, or date parameters cannot be moved forward. Direct Loan Setup including Disbursement Profiles cannot be moved forward as well.
- The message classes for Direct Loan ED-Initiated Reports are predefined in Global Setup eliminating the need to enter them manually.
- Terminology for the following fields is updated for consistency across all SFA programs:
  - “HEAL” now reads “Additional Unsubsidized Eligibility for Health Profession Programs”
  - “Loan Year” now reads “Program Year”
  - “Default on Education Loans” now reads “Loan Default/Grant Overpayment”

## ***Direct Loan***

### **Setup**

- “Actual Disbursement Type” is a new option in DL System Setup. This option allows you to indicate your school’s preference of entering actual disbursements using Gross (G) or Net (N) disbursement amounts.
- The checkbox “Does Your School Perform Drawdowns” is removed in DL System Setup. All schools, Option 1, Option 2 and Standard Origination, can now enter actual disbursements in EDEExpress using either Gross or Net disbursement amounts.
- A checkbox “Do you use multi-year MPNs at your school?” is added to DL System Setup. This checkbox provides the option for you to indicate if your school is processing MPNs using multi-year functionality. If your school is processing MPNs using single-year functionality, this checkbox should not be marked. This setup option is extremely important as it is used to determine whether to print an MPN for an individual loan.
- Subsidized/Unsubsidized Interest Rebate Percentage and PLUS Interest Rebate Percentage fields are added in DL System Setup. Both of these fields default to the current 1.5% up-front interest rebate.
- Upon importing ISIRs into EDEExpress, the MPN Indicator is displayed under View on the NSLDS tab and stored as a Demographic field for queries and external exports. The MPN Indicator is the status of the student’s MPN at the LOC at the time the ISIR is generated. If a school is using multi-year functionality to process MPNs, EDEExpress uses this indicator to determine if it is necessary to print a new MPN for this borrower.

### **Demo**

- The borrower and student’s first name is expanded to 12 characters and the permanent and local address is expanded to 35 characters to match the data elements from the FAFSA.
- The software no longer performs edits on the Zip Code on the Demographic tab.
- The student’s e-mail address is added to the Demographic tab. This field is 50 bytes and is updateable. When available, EDEExpress includes the e-mail address on the loan record when it is sent to the LOC and it is then passed on to Loan Servicing.

## **Loan Tab**

- Fields that display on the Loan tab are determined by loan type PLUS, subsidized or unsubsidized. For example, when you enter a PLUS loan, both the Borrower's and Student's Loan Default/Grant Repayment fields display but when you enter a subsidized loan, only the Borrower's Loan Default/Grant Repayment field displays.
- Loan Amount Requested is a PLUS-only field and is no longer captured for subsidized or unsubsidized loans. Therefore, this updateable field is only displayed for PLUS loans.
- Record Source field is added to the Loan Tab. This field displays the method by which a loan record was created; i.e., manual entry, external import add, ISIR import or packaging import. For example, if you create a loan record by importing an External Import Add (DIEA##OP), this field displays a corresponding record source of "E" (External Import Add).
- Student's College Grade Level codes are updated to 0-7 to agree with the FAFSA.
- The Professional Judgement field is removed from the Loan tab.
- All MPN and PLUS promissory note statuses are combined into one field, the MPN Status or the Promissory Note Status (PLUS). In addition, the MPN Status of "T" indicates that the school assumes the student has a valid MPN at the LOC and replaces last year's MPN Exists field. The MPN Status and Promissory Note Status of "S" indicates that the MPN or PLUS promissory note is signed and replaces the Borrower and Student Signed check boxes.

## **Loan Entry**

- Loan Information fields are reorganized to assist with data entry. Pre-filled fields display first and are followed by fields requiring data entry. Upon entering a loan record, the cursor goes to the first field available for data entry.
- A new edit disallows the parent borrower current Social Security Number to be the same as the student's current Social Security Number.
- The edit requiring the Alien Registration Number field to be blank if the citizenship status is "1," U.S. Citizen, is removed.

## **Disclosure Statements**

- The Disclosure Statement Print Indicator has a new value of “Z” to request the LOC reprints a Disclosure Statement at the LOC for loan records at a “B” or “A” status.
- The Disclosure Statement is updated to print Gross Loan Amount, Loan Fee Amount, Interest Rebate Amount, and Net Loan Amount. Only the Anticipated Net Disbursement Amount and Date are printed for each individual disbursement. In addition, EDEExpress can now print up to 20 anticipated disbursements on a Disclosure Statement.

## **Inactive Loan Flag**

- When you mark the Inactive Loan flag, you may also select the option to adjust the Loan Amount Approved and all anticipated disbursements to zero. If this option is selected, appropriate Change Records are generated for export to the LOC.

## **First Disbursement**

- A “First?” checkbox is added to the Disbursement tab to indicate that a subsequent disbursement should be the first disbursement. A subsequent disbursement can be flagged as the first disbursement after disbursement #1 is accepted by the LOC as long as the disbursement date is the earliest disbursement date for the loan.

## **Disbursement Tab**

- The disbursement totals always display at the bottom of the anticipated and actual disbursement grids on the Disbursement tab.
- We removed the Refund Code and Refund Date from the EDEExpress Disbursement tab and External Export record layout.
- Loan Origination Status, Loan Amount Approved, MPN Status and PLUS Promissory Note Status are displayed on the Disbursement tab as well as on the Loan tab. These fields continue to be updateable only on the Loan tab.



## **Redefined Actual Disbursement Action Types**

- The actual disbursement Action Types are redefined as follows:
  - D = Disbursement (replaces “G” and “N”)
  - U = Copy Anticipated Disbursement
  - Q = Adjusted Disbursement Date
  - A = Adjustment (replaces “J” and “A”)
  - N = Net Adjusted Disbursement Amount
- The “N” – Net Adjusted Disbursement Amount action type allows you to record adjustments to disbursements by entering the Net Adjusted Disbursement amount that may be positive or negative. EDEExpress calculates the Gross Disbursement, Fee, Interest Rebate, and Net Disbursement amounts when the Net Adjusted Disbursement amount is entered.

## **Reports**

- All Measurement Tool and List reports are updated to a consistent format with the student’s name always printing first followed by the PLUS borrower’s name, if applicable. In addition, the student’s name prints only once even when multiple loans are listed for the student. The Loan ID and Batch ID are listed for each loan.
- The Loan Origination Measurement Tool, the Origination Change Measurement Tool, and Batch Regeneration Measurement Tool reports are eliminated. The List Cash report is moved to a new EDEExpress software product Direct Loan Tools to be available early summer.
- The Promissory Note List and Promissory Note Measurement Tool are combined into the PLUS Promissory Notes Measurement Tool and the Master Promissory Notes Measurement Tool.
- The Batch Activity List and Batch Activity Measurement Tool are combined into the Batch Activity Measurement Tool.
- Booked Status Measurement Tool is upgraded to the Status Measurement Tool providing a review of booked and unbooked records in the database within a specified disbursement date range.
- A new Disbursement Profile List report provides a listing of your disbursement profiles entered in DL Disbursement Setup. This listing includes Loan Period start and end dates, academic year start and end dates, and anticipated disbursement dates.

## Query

- New pre-defined queries are created for Disbursement Status, Rejected Actual Disbursements, Accepted Actual Disbursements, Rejected Origination Records and Accepted Origination Records.

## External Record Layouts

- The record length of the External Import Add file (DIEA) is increased to 401.
- The record length of the External Import Change (DIEC) is increased to 579.
- Additional updates to the external record layouts are reflected in the 2001-2002 Direct Loan Technical Reference.

## New External Import Change Field Numbers

- D008 - Actual First Disbursement Change Flag
- S126 - Student's E-mail Address
- S193 - Interest Rebate Percentage
- S104 - Borrower's Permanent Address Change Date
- S105 - Student's Local Address Change Date
- S106 - Borrower's Social Security Number Change Date
- S107 - Borrower's Date of Birth Change Date

## Direct Loan Technical Reference

The *Direct Loan Technical Reference* contains technical details such as record layouts, valid field content, edits and report mockups.

The technical reference can be downloaded from the SFAdownload Web site:

**<http://SFAdownload.ed.gov>**

# Issues in EDEExpress, Version 7.1

EDEExpress, Version 7.1 provides the following additional changes to the software.

## ***Application Processing***

- 3198      The text for ISIR comments 047 and 170 is updated.
- 3201      Under List – Processed ISIRs, EFCs no longer print with commas.
- 3229      Highlight flags appear, if necessary, for Student’s Total from Worksheet B and C, Father’s SSN, Mother’s SSN, Father’s Last Name, Mother’s Last Name and Parent’s Total from Worksheet B. There is no highlight for Date Application Completed.
- 3240      Text is added for ISIR comments 005 and 056. The text for ISIR comment 058 is updated.
- 3255      ISIR comment codes 059, 084 are updated to accurately reflect the status of an  
3376      SSA match of 8.
- 3270      The query help text for the Prisoner Match Flag is updated to reflect the  
3391      current valid values and descriptions.
- 3293      Under the help link ‘Correcting or Changing a Housing Code’ the link for ‘Federal School Code’ has been fixed.
- 3294      Under the help link ‘Correcting Records not in Your Database’, the link to ‘Federal School Code’ is now working properly.
- 3309      The help text is revised to give instructions on printing Renewal Applications.
- 3343      Initial Application values entered for Parents’ Worksheets B and C are exporting correctly.
- 3368      The alternate AAI Offset used for calculating greater than 9 month EFCs for Formulas 1 and 4 is updated.
- 3389      The certification text for the ISIR and FAFSA print reports is updated to match the text on the CPS generated ISIR.
- 3408      Imported Renewal Application demographic data overrides imported prior year  
3409      demographic data regardless of which action is performed first.

## **Packaging**

- 3295 In Help Text under Index for 'Features (Packaging)', the FISAP link within the 'Reporting' component is now working correctly. The definition of FISAP is now provided when you click on the 'FISAP' link.
- 3297 In Help Text under Index for 'College Grade Level (Packaging)', the grade level codes are updated. They are now listed zero through seven (0, 1, 2, 3, 4, 5, 6, 7) instead of (0, 1, 2, 3, 4, 5, 6, 6,).
- 3315 The word "Direct" is removed from the aid types in the help topic 'Self-Help Aid Maximum Amount'. They now read 'Subsidized Loan' and 'Unsubsidized Loan' instead of Direct Subsidized Loan and Direct Unsubsidized Loan.
- 3401 Funds can be added manually for more than 100 defined funding sources. In addition, fields with 100 or more defined values operate properly in all modules of EDEExpress.

## **EDEExpress Supports These Printers**

We tested the following printers that are Windows NT 4.0, Windows 95, Windows 98, and Windows 2000\* compatible:

- HP LaserJet 4
- HP LaserJet 4000N
- HP LaserJet 4M
- HP LaserJet 4M Plus
- HP LaserJet 4 si
- HP LaserJet 5M
- HP LaserJet 5 si
- HP LaserJet 5 si MX
- HP LaserJet 3 si
- HP LaserJet 8000N\*

\*No functional Windows 2000 driver was found for the HP LaserJet 8000N printer.

## **EDEExpress Benchmarking**

We performed benchmarking tests on the EDEExpress for Windows, Version 7.1 software to determine how it operates in certain operating environments.

**Note:** The minimum hardware and software specifications, published in the Federal Register on September 19, 1997, still apply for 2001-2002. The minimum hardware and software specifications published in the Federal Register on December 22, 2000, will be applicable for 2002-2003.

## Reports

<b>Report</b>	<b>Operating System</b>	<b>Benchmarking Volume</b>	<b>Average Time Elapsed</b>
Award Letters	NT 4.0	3 records	2 seconds
Award Letters	Windows 95	3 records	2 seconds
Award Letters	Windows 98	3 records	2 seconds
Award Letters	Windows 2000	3 records	2 seconds
Document Tracking Letter	NT 4.0	5 records	3 seconds
Document Tracking Letter	Windows 95	5 records	2.5 seconds
Document Tracking Letter	Windows 98	5 records	2.5 seconds
Document Tracking Letter	Windows 2000	5 records	3 seconds
ISIR	NT 4.0	2 records	1.5 seconds
ISIR	Windows 95	2 records	2 seconds
ISIR	Windows 98	2 records	2 seconds
ISIR	Windows 2000	2 records	2 seconds
Mailing Labels	NT 4.0	65 records	1 second
Mailing Labels	Windows 95	65 records	1 second
Mailing Labels	Windows 98	65 records	1 second
Mailing Labels	Windows 2000	65 records	1 second
Packaging Setup	NT 4.0	25 pages	2 seconds
Packaging Setup	Windows 95	25 pages	2 seconds
Packaging Setup	Windows 98	25 pages	2 seconds
Packaging Setup	Windows 2000	25 pages	2 seconds
Processed ISIRs	NT 4.0	29 records	1 second
Processed ISIRs	Windows 95	29 records	1 second
Processed ISIRs	Windows 98	29 records	1 second
Processed ISIRs	Windows 2000	29 records	1 second

## ***Packaging***

The benchmarking results of the EDEExpress Packaging process are as follows.  
Packaging was benchmarked on a stand-alone Pentium 200 with 64 MB of RAM.

<b>Component</b>	<b>Operating System</b>	<b>Benchmarking Volume</b>	<b>Average Time Elapsed</b>
Award Letters	NT 4.0	3 records/9 pages	2 seconds
Award Letters	Windows 95	3 records/9 pages	2 seconds
Award Letters	Windows 98	3 records/9 pages	2 seconds
Award Letters	Windows 2000	3 records/9 pages	2 seconds
Packaging Setup	NT 4.0	25 pages (average)	2 seconds
Packaging Setup	Windows 95	25 pages (average)	2 seconds
Packaging Setup	Windows 98	25 pages (average)	2 seconds
Packaging Setup	Windows 2000	25 pages (average)	2 seconds

## ***Direct Loan Import***

Following are the benchmarking results of the EDEExpress Direct Loan process. Direct Loan was benchmarked on a stand-alone Pentium 200 with 64 MB of RAM.

<b>Component</b>	<b>Operating System</b>	<b>Benchmarking Volume</b>	<b>Average Time Elapsed</b>
External Change	NT 4.0	1000 records	12 mins, 1 sec
External Change	Windows 95	1000 records	9 mins, 11 secs
External Change	Windows 98	1000 records	9 mins, 38 secs
External Change	Windows 2000	1000 records	9 mins, 41 secs
ISIR Import	NT 4.0	1000 records	8 mins, 57 secs
ISIR Import	Windows 95	1000 records	8 mins, 53 secs
ISIR Import	Windows 98	1000 records	8 mins, 55 secs
ISIR Import	Windows 2000	1000 records	8 mins, 40 secs

## ***Direct Loan Printing***

Following are the benchmarking results of the EDExpress MPN/PLUS Promissory Note print and List Anticipated Disbursement report. The tests were run in Windows NT, Windows 95, Windows 98, and Windows 2000 on HP LaserJet 3si, 4, 4000N, 4M, 4M Plus, 4 si, 5M, 5 si, 5 si MX, and 8000N\* printers. These tests were all completed on a Pentium II 266 with 64 MB RAM.

The Average Time Elapsed column indicates the measurement of time starting when you click OK in the EDExpress Print dialog box and when the operating system (Windows NT/95/98/2000) print dialog appears.

The Benchmarking Volume is the number of records and approximate number of pages that were printed in the test.

\* There currently is no functional Windows 2000 print driver for the HP 8000N printer.

<b>Component</b>	<b>Operating System</b>	<b>Benchmarking Volume</b>	<b>Average Time Elapsed</b>
List – Anticipated Disbursement	NT 4.0	5 records/3 pages	1 second
List – Anticipated Disbursement	Windows 95	5 records/3 pages	1 second
List – Anticipated Disbursement	Windows 98	5 records/3 pages	1 second
List – Anticipated Disbursement	Windows 2000	5 records/3 pages	1 second
Prom Notes - MPN	NT 4.0	2 notes/4 pages	2 seconds
Prom Notes - MPN	Windows 95	2 notes/4 pages	2 seconds
Prom Notes - MPN	Windows 98	2 notes/4 pages	2 seconds
Prom Notes - MPN	Windows 2000	2 notes/4 pages	2 seconds
Prom Notes - PLUS	NT 4.0	2 notes/4 pages	1 second
Prom Notes - PLUS	Windows 95	2 notes/4 pages	1 second
Prom Notes - PLUS	Windows 98	2 notes/4 pages	1 second
Prom Notes - PLUS	Windows 2000	2 notes/4 pages	1 second

# Reminders

## ***Back Up Your Database Weekly***

You should back up your EDEExpress for Windows database file, EXPRES12.mdb, regularly so you don't lose your data. We recommend that you back up your files at least weekly. You should also back up your data before and after you run utilities as a precautionary measure.

EDEExpress for Windows does not include a backup utility. You must use your own backup software. You should test your backup software to verify its reliability to successfully restore your backups.

## ***Optimize Your Database by Using Software Utilities***

The EDEExpress for Windows software contains utilities that allow you to optimize your database if you encounter problems. We recommend that you repair, compact, and verify your database once a week. Once all three are successful, back up the database (see section above).

Run the database utilities in the following order:

- Repair Database
- Compact Database
- Verify Database
- Repair Database
- Compact Database

For specific information regarding repair, compact, and verify, see the appropriate section below.



## ***Run the Repair Database Utility***

The Repair Database utility resolves inconsistencies (also called database corruption) in records storage. Events such as a power outage or a LAN failure can corrupt your database if it occurs while EDEExpress for Windows updates your records.

EDEExpress may not detect database corruption, so if your system behaves unpredictably (for example, you start getting database error messages, even for something as simple as a missing flag on a record), use the repair database utility. Running this utility weekly helps to prevent database problems.

**Warning:** Before using this utility, be sure you have space on your hard drive that is at least equal to three times the current size of the database.

## ***Improve Performance by Using the Compact Database Utility***

The Compact Database utility improves the performance of EDEExpress for Windows by optimizing the database (EXPRES12.MDB) file and reclaiming space on your computer's hard drive. As you add, modify, or delete records in EDEExpress for Windows, the database file can become fragmented.

Running this utility weekly makes the database files smaller and improves system performance. It can also significantly reduce the size of your database. This does not mean that records were removed, only that the database is more compact.

**Warning:** Before using this utility, be sure you have hard drive space available at least equal to three times the current size of the database.

## ***Prevent Problems by Using the Verify Database Utility***

The Verify Database function checks for data relationship integrity in your database. If EDEExpress for Windows crashes or abnormally halts processing, a record may be missing one of its associated records. Verify Database recreates the missing record.

Running this function weekly helps to prevent problems.

**Warning:** Before using this utility, be sure you have hard drive space available that is at least equal to three times the current size of the database.